

2 CHAPTER: IRMS INTRODUCTION AND NAVIGATION

2.1 Overview of IRMS

The Department of Taxation (TAX) is responsible for administering the Virginia Set-Off Debt Collection Program, commonly called the Set-Off Program. To help accomplish this, a web-based Integrated Tax Revenue Management System (IRMS) has been developed to provide the ability for Set-Off Agencies to create, revise, and review claim and match information on-line.

2.1.1 How IRMS Organizes Information

Once you are successfully logged into the IRMS Web application, you can view information about the claims and matches submitted by your Agency including:

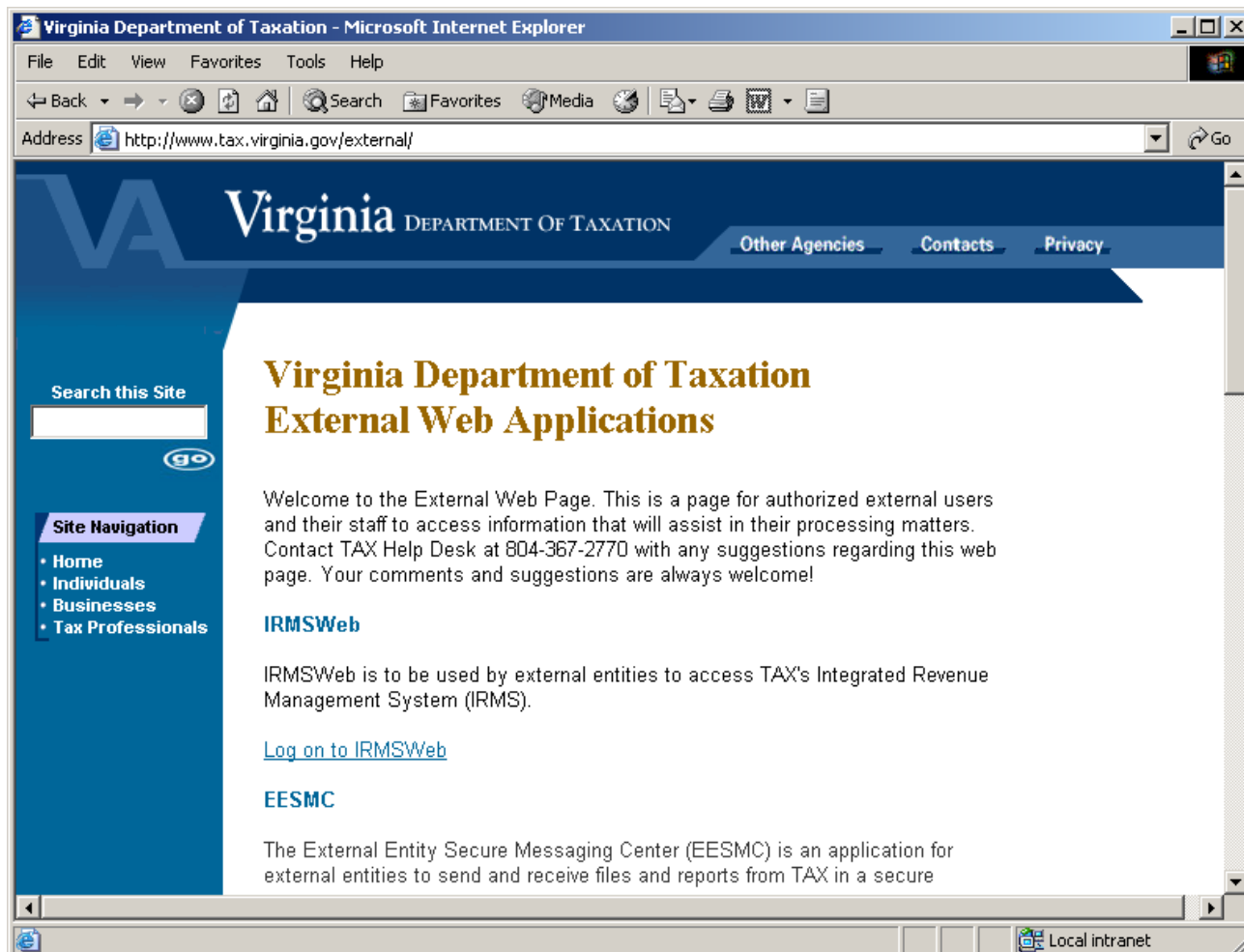
- Claim Summary, Detail, and History Information
- External Offsets in Progress Information
- External Offsets Payment Summary and Payment Detail Information.

You can also manage claim and match information including:

- Create, Modify, Delete, or Reinstate Claims
- Certify or Contest a Set-Off Match
- Finalize a Set-Off Match
- Correct a Set-Off Finalized Amount



Note: Remember, this manual is specific to on-line IRMS processes. You can also submit claim and match information using batch processes.

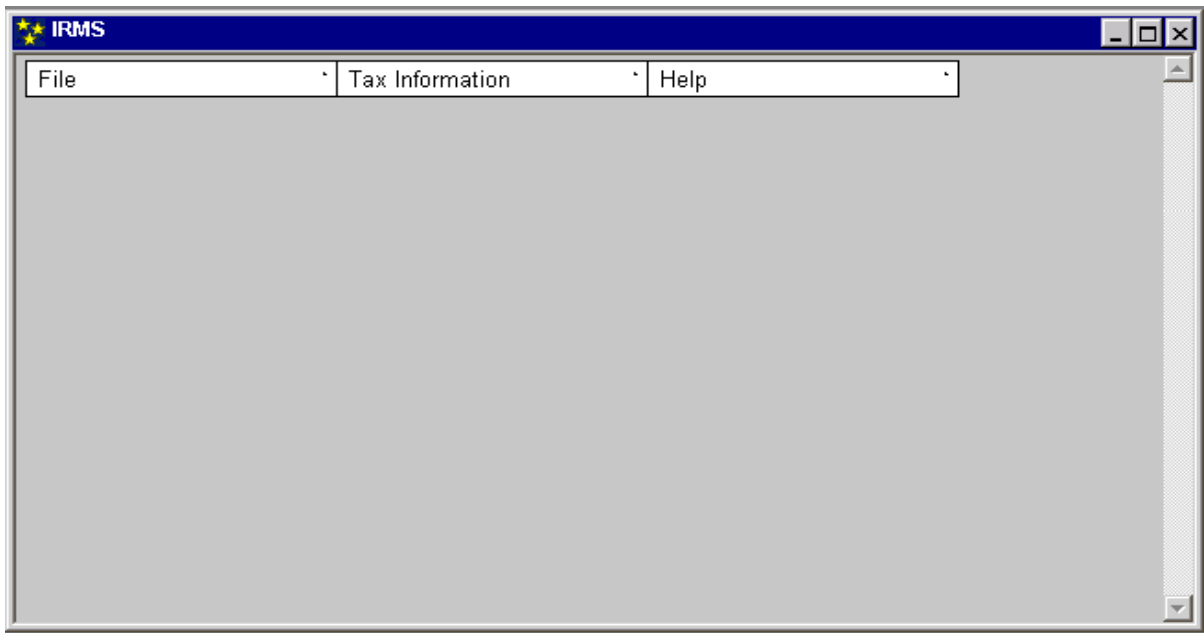


Step 3: Click the **Log on to IRMSWeb** link. The IRMS Login window displays.



Note: Subsequent logins will not require a Password change, but will display the main menu window when you enter your correct User ID and Password. You will be notified before your password expires. You can change your password before it expires by clicking the **Change Password** button when you login.

Step 10: Click **OK**. The IRMS Main window opens.



Note: Keep in mind that you need to login to the IRMS application at once every 60 days in order to keep your account active.



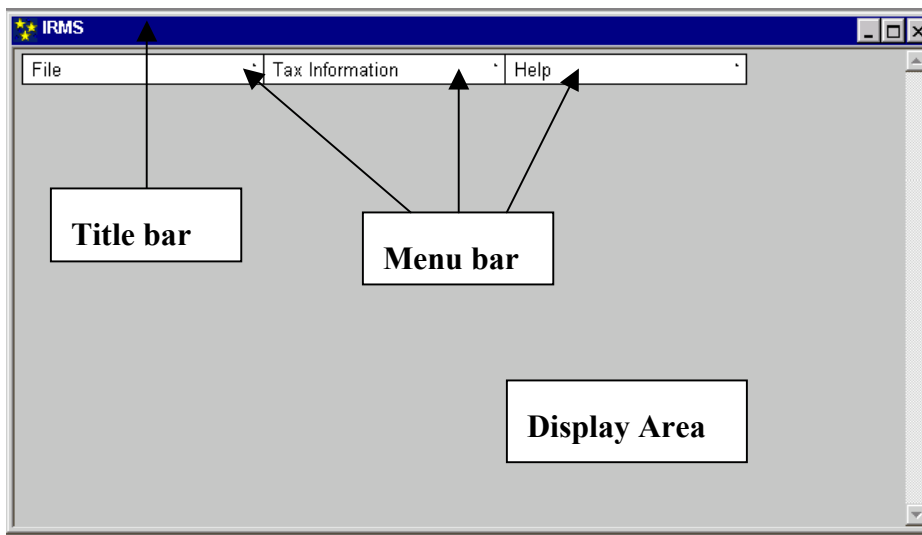
2.3 Accessing IRMS Information

2.3.1 IRMS Main Window

After you have successfully logged into IRMS, you will see the IRMS Main window. All of your work in IRMS will originate from this window.

The contents of this window include:

- **Title Bar** identifies which window you have accessed and includes the standard windows resizing buttons.
- **Menu Bar** lists the pull down menus that are used to access IRMS windows. The menus displayed on the Menu Bar may change depending on which IRMS window is active. You can display the contents of each window by clicking on the menu and choosing an item from the pull-down boxes.
- **Display Area** contains the specific window you have accessed. The illustration below is the IRMS Main window.



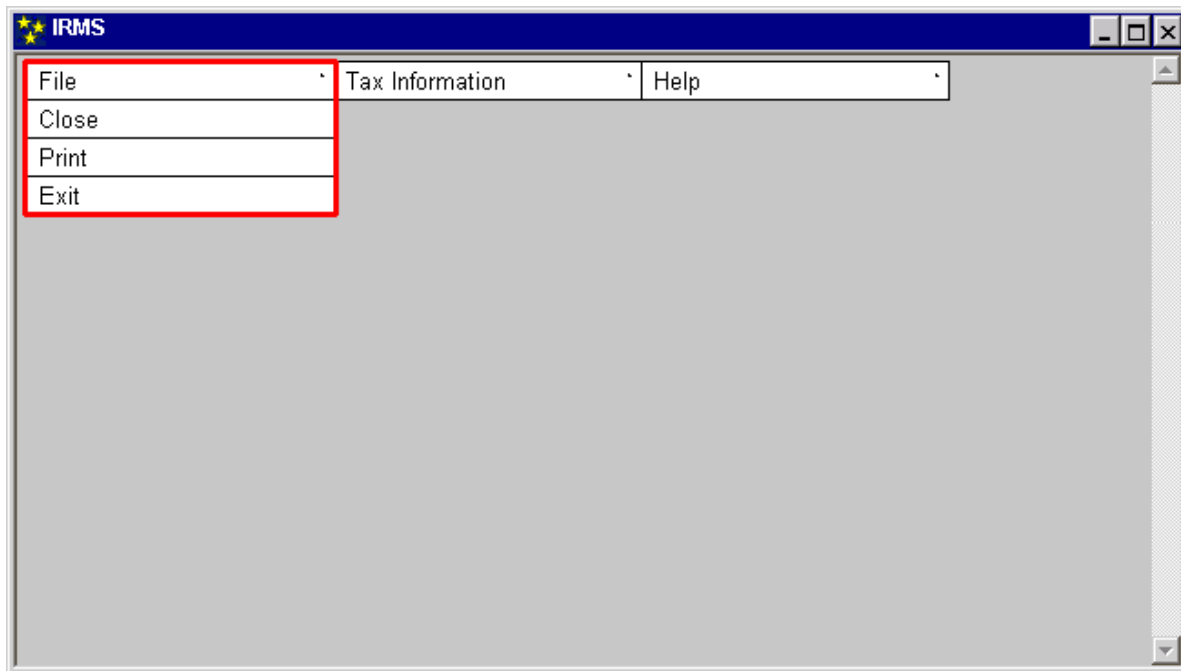
The IRMS Main Menu Bar

The Menu Bar contains three Menus: File, Tax Information, and Help. To access the information in IRMS, you must choose an activity from one of these menus.



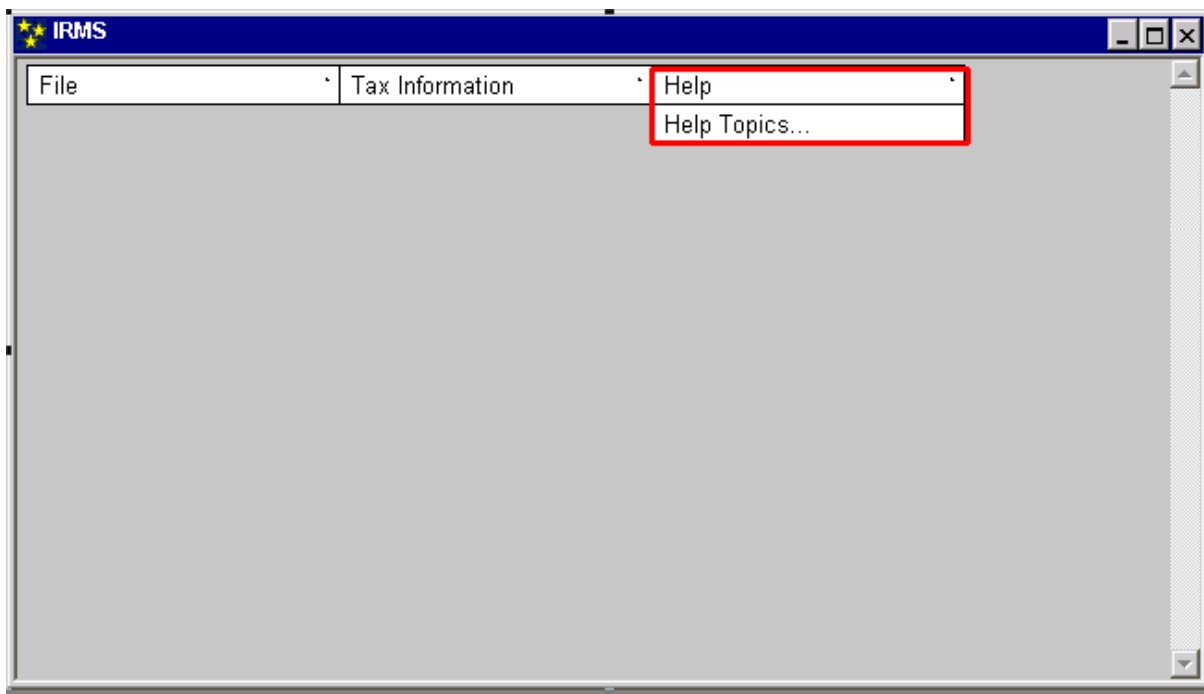
Note: Depending on your role, the menus shown in the illustration above may vary.

The illustration below is the IRMS Main window – File menu:



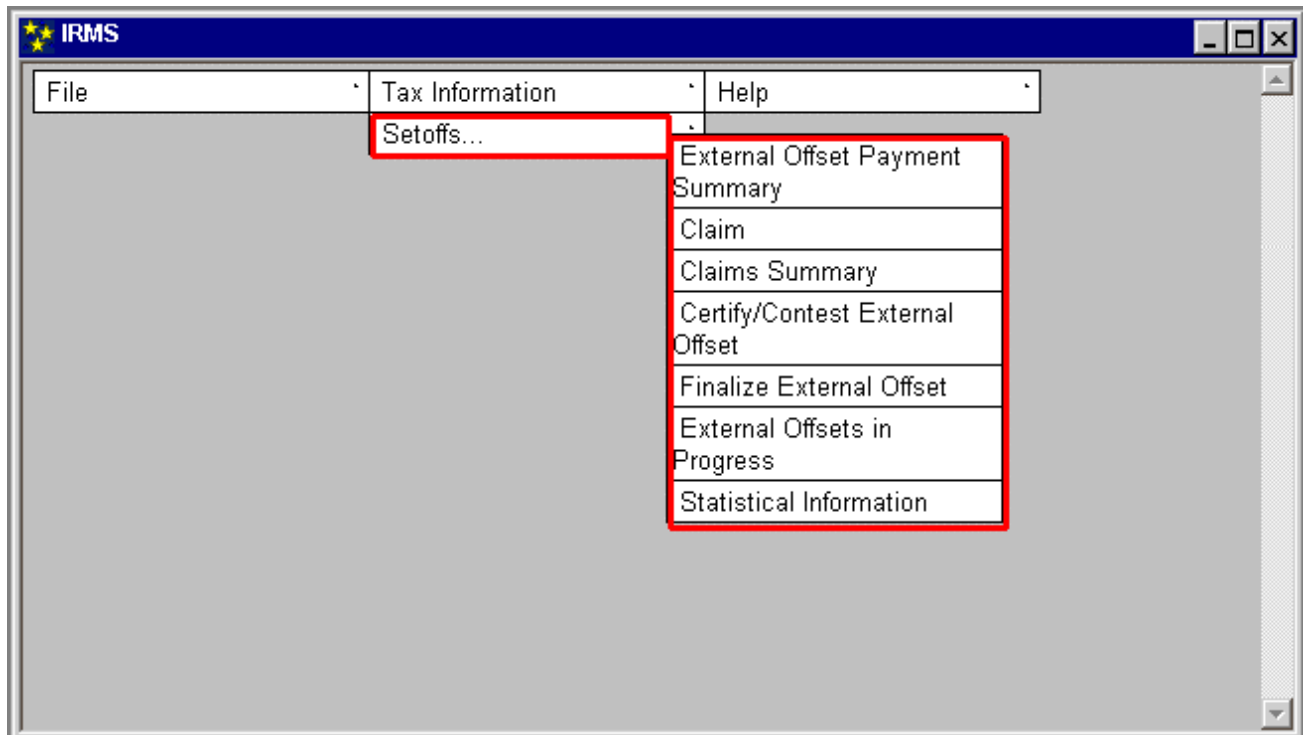
The File menu provides you with the ability to Print, Close the current window, and Exit IRMS.

The illustration below is the IRMS Main window – Help menu:



The Help menu provides on-line IRMS Performance Support System (PSS) help.

The illustration below is the IRMS Main window – Tax Information menu:



This is the menu that you will use most often to navigate in IRMS and access information.



Note: Depending on your role, you may not have all of the menu selections shown in the illustrations below.

2.3.2 IRMS Windows

After you have selected an item from one of the menus on the Main window, you will view an IRMS window displaying the information you selected.

There are several different types of windows in IRMS. The types of windows are:

- **List** - These windows display lists of items that you can select to view additional information. You highlight an item on the list to view a Detail window.
- **Detail** - These windows contain fields for you to view, enter or change information.
- **Pop-up** - These windows are intended to make you aware of the consequences of your actions. Most often, they either remind you of what you have done, or ask for a confirmation that you have done what you intended. These message boxes and error messages are discussed in the appropriate chapter(s).

The illustration below is an example of a Detail window:

Finalize External Offset

External Offset Match

Match ID:

Find

External Offset Information

Claim Number:

Claim Name:

Agency Name:

Match Status:

Initial Contested Date:

Match Amount:

Match Date:

Contested Date:

Finalized Action:

SSN/FEIN:

Agency Number:

Source Type:

Certification Date:

Finalized Amount:

Save

Close

The illustration below is an example of a List window:

External Offset Payments Summary

Selection

Agency Number: Processing Year:

Payment Date	Voucher Number	Number of Items	Amount Finalized	Administrative Cost	Amount of Payment
02/15/2004	54321543	13	\$10,123.23	\$0.00	\$10,123.23
03/15/2004	87654321	28	\$26,240.39	\$0.00	\$26,240.39
05/15/2004	12345312	61	\$123,456.78	\$0.00	\$123,456.78
Total YTD -		102	\$159,820.40	\$0.00	\$159,820.40

The illustration below is an example of a Pop-up window:

IRMS Login

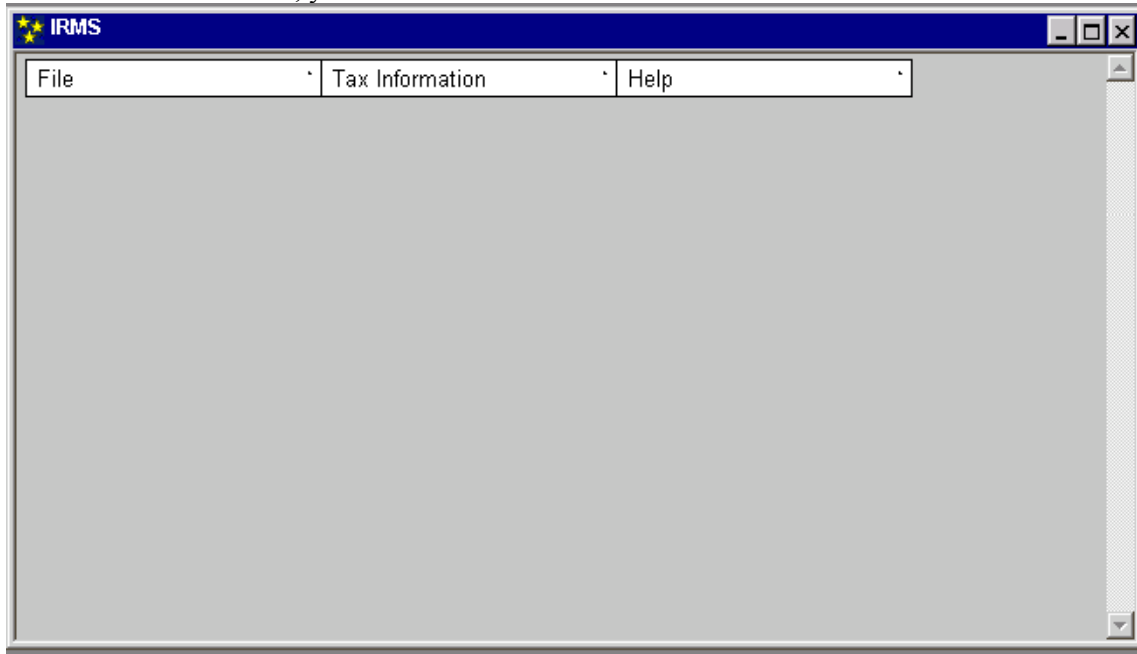
User ID:

WARNING!

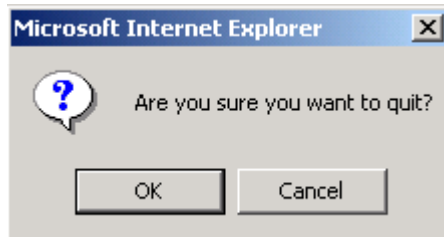
Warning! IRMS cannot locate the password you entered.
Please try again.

2.4 Ending a Session

To end an IRMS session, you must return to the IRMS Main Window.



Step 1: From the **File** menu, select the **Exit** option. You receive a system prompt pop-up window asking you to confirm the exit.



Step 2: Click **OK** to exit IRMS and return to your desktop window, OR
Click **Cancel** to return to IRMS if you do not want to exit.